



The Great Wood Stove & Fireplace Changeout



Great Wood Stove & Fireplace Changeout 2001: Report

Background and History

The North Central Hearth Products Association (NCHPA), in partnership with the Hearth Products Association (HPA), and three other US industry affiliates (Middle States, Midwest, and Northeast) as well as the Canadian affiliate determined to sponsor a Wood Stove & Fireplace Changeout program during the months of February, March and April, 2001. This resulted in a total of 12 states participating including Wisconsin, Minnesota, Iowa, North and South Dakota, Upper and Lower Michigan, Illinois, Ohio, Missouri, Indiana, Kentucky and New York as well as a portion of Ontario, Canada in this effort.

This large-scale project was undertaken at the urging of the Environmental Protection Agency (EPA) Region 5 office to affect a decrease in airborne pollutants, in particular, benzo-a-pyrene which is being found in the Great Lakes. One source of this chemical, as identified by the EPA, is from the incomplete combustion of wood burning. Old stoves and inserts built before 1992 do not burn as cleanly as newer product, and removal of such appliances could help with reduction of this emission. The hearth industry has been conducting Stove Changeout programs in parts of western United States for 10 years to encourage this very emission reduction. The HPA has been participating with the Bi-National Toxics Accord Strategy in their effort to clean up the Great Lakes since 1998.

NCHPA conducted a pilot program in spring of 2000 to ascertain needs in preparation of the larger scope program planned for 2001. This pilot was held in northeastern Wisconsin and in the areas surrounding Traverse City, Michigan. On-site meetings were held in both areas in fall of 1999 with potential retailer participants, marketing individuals, select staff from the Wisconsin Department of Natural Resources (DNR), EPA, Michigan Department of Environmental Quality (DEQ) and staff from HPA and NCHPA. A total of 21 retailers (14 in Wisconsin and 7 in Michigan) participated in this pilot program. Information obtained from this pilot was used to redesign the effort for 2001.

In the summer and fall of 2000, NCHPA and HPA staff approached various state government agencies to participate as possible with the 2001 effort. Contacts included the Wisconsin Department of Natural Resources, the Wisconsin Department of Administration – Division of Energy; Michigan Department of Environmental Quality, Minnesota Department of Natural Resources and the Minnesota Pollution Control Agency. Other states were also contacted for government participation. Additional contacts were made with environmental agencies, utility companies, and the Steel Recycling Institute. The Steel Recycling Institute determined an active sponsor role, encouraging their members to help with the recycling effort of all stoves and inserts.

2001 Industry Changeout Program

Retailers were solicited to participate in the Changeout program in fall of 2000 by NCHPA targeted mailings, post cards and newsletters. Offers to participate were made to association and non-association retailers. Manufacturers were contacted for participation by HPA staff. Those retailers that chose to participate signed a Memorandum of Understanding

that outlined the program and requirements. A fee was charged that would help offset some of the costs for materials and consumer mailings. Association members were charged \$150 while non-association members were charged \$250.00. Once the MOU and check was received, program materials (Retailer Kits) were sent to the stores, contact information was immediately posted on the web page and the lists of retailers were revised for the Consumer packets. The program included changing out old wood stoves, wood inserts or conversion of open hearths to new clean burning stoves, inserts or gas logs.

A Public Relations firm from Seattle, Washington (The Frause Group) was awarded a contract to assist with all media events and media contacts. Funding for their assistance was obtained from a grant through the EPA. HPA staff administered this. The Frause Group also developed media kits and marketing materials which were distributed to all participating retailers. They also established a broadcast fax network of interested individuals and communicated with all on a regular basis. The EPA grant also provided for establishment of a toll free line, 24/7 answering service for consumers and a web page (www.woodstovechangeout.org).

HPA and Affiliate staff, along with the Frause Group, held a number of conference calls in advance of the onset of the Changeout in order to coordinate needs, identify potential problems and develop strategies to deal with issues. The Frause Group developed a detailed outline of tasks which assisted all involved to accomplish program objectives. The conference calls helped staff to focus on all the program details and was critical in the coordination and management of a project of this magnitude. Various materials developed such as home show handouts or graphic labels were shared among all affiliates.

Three media events were held to kick off the program. These occurred on February 1, 2001 in St Paul, Minnesota; February 5, 2001 in Lansing Michigan; and February 7, 2001 in Madison, Wisconsin. Representatives from the industry, industry staff, EPA, and various state government representatives participated in each of the media events. Old wood stoves and new EPA certified wood stoves were set up to burn outside each of the media locations. This would visually demonstrate the differences in smoke, and therefore emissions, from the old to new. Television, radio and print media were in attendance at all three events. Phone or site visit follow-up was done with media not in attendance by staff of the Frause Group. Consumers were encouraged to call the toll free number or check out the web page to obtain more information about the program as well as a list of participating retailers. The 24/7 answering service sent an efax of consumers calling the toll free line to the respective affiliates on a daily basis. Affiliates then sent each consumer a packet containing information on the Changeout. The packet included information on wood burning, generic products, a pellet brochure, a list of participating retailers and state government enclosures such as on mercury or use of burn barrels.

Participating retailers were sent a sample packet of consumer information as well as details on the Changeout, media kits, advertising slicks, masters for handouts at home shows, hang tags, lists of participants, banners and tracking forms. Additional communications were sent to the NCHPA retailers as the program progressed, providing updates on calls and re-iterating program details. NCHPA created a specific section on their second set of correspondence that addressed the DNR rebate program and the availability of a loan program through the Wisconsin Department of Administration – Focus on Energy program

Changeout Tracking forms have been utilized since inception of the industry sponsored Stove Changeout program in the early 90's. They elicit consumer and retailer information as well as provide a space for verification that the stove or insert was taken

to and accepted by a salvage yard. These were to be completed and submitted to the respective Affiliate office once the transaction was complete and old appliance taken to the salvage yard. The Affiliate would then send a copy of the tracking forms to the manufacturers on a batch basis for them to provide credit back to the retailers.

NCHPA also established a database of consumer calls for information from the toll free line as well as one on retailer changeouts from the Tracking Forms.

2001 Government Incentives

For the 2001 Changeout program, the Wisconsin Department of Natural Resources proposed a rebate program, funded through their Great Lakes Protection Fund. Their stipulations were that the consumer must surrender a wood stove or fireplace insert and purchase an appliance from a participating retailer whose store was located in one of 36 Great Lakes Basin counties in Wisconsin. The industry program always included discounts on products from retailers and manufacturers. Although the industry program, this year, also included discounts for the conversion of an open hearth fireplace to a new insert or gas logs, the DNR did not elect to include this type of change in their rebate program despite urging this inclusion by industry staff.

Copies of the Changeout Tracking Forms were requested by the Wisconsin DNR to be submitted on a monthly basis along with an alphabetical list of consumers and an invoice for the number of Changeouts. Once reviewed, personally addressed letters were prepared and signed by DNR Secretary Darrell Bazzell and sent back to NCHPA along with a check for the total amount requested for that month. The DNR rebate program was \$200 per unit changed out. The DNR required that NCHPA administer the grant program and issue the checks. No monies for administration were funded through the grant.

The Wisconsin Department of Administration had a financial incentive through their Focus on Energy program that was extended to retailers in a twenty three county area of northeastern Wisconsin. This program was separate from the Changeout, initiated in fall of 2000 by the DOA. Any retailers involved with selling renewable energy products in these 23-counties could apply to the State to become a certified contractor. Consumers purchasing a renewable energy product could then apply for a 4% interest loan from the State if product was purchased through these certified contractors. This 23 county area overlapped the 36 county Great Lakes Basin area. Twenty retailers of the 33 Changeout retailers located in the Great Lakes Basin counties were eligible to participate in this DOA sponsored program as well. [Note: information from the DOA on which Changeout retailers were also involved with the Focus on Energy program is not available at this time].

Participation Results

Retailers

A total of 124 (15 from NEHPA and 30 from MS/MWHPA) retailers signed up to participate in Changeout 2001. Of these, 79 retailers were from NCHPA. Forty-six signed up before 2/1/01. Another 23 joined in February, 7 in March, 1 in April and 2 in May, after the program was actually concluded. These last two retailers thought they had signed up and were offering discounts as well as the DNR rebate program since the two stores were in the Wisconsin Great Lakes Basin counties.

Of the 79 signed up for NCHPA, 4 were non-members. Although these four were not members, they will be referred to as "NCHPA retailers" for the purpose of this report. The 79 hailed from the following states: 4 from Iowa, 3 from the Upper Peninsula of Michigan, 19 from Minnesota, 4 from North Dakota, two from South Dakota, and 47 from Wisconsin. Of the 47 in Wisconsin, 33 had stores located in one of the 36 Great Lakes Basin counties and were eligible to offer the DNR \$200 rebate for a Changeout of stove or insert.

Manufacturers

Officially, there were 24 manufacturers that sent in forms and were listed as of 1/29/01 that they were going to participate in the 2001 Changeout. These included the following (in order as listed on the Changeout web page):

- ☞ Travis Industries
- ☞ Empire Comfort Systems
- ☞ Napoleon Fireplaces
- ☞ Blazeking Industries
- ☞ Specialty Ceramics Inc
- ☞ Montigo Del Ray Corp
- ☞ Kel Ken Ltd
- ☞ Jotul North America
- ☞ Pacific Energy Fireplace Products
- ☞ FPI – Regency
- ☞ Country Stoves Inc
- ☞ Heatech Inc
- ☞ Heat N Glo
- ☞ Aladdin Hearth Products
- ☞ Vermont Castings/Majestic
- ☞ Lennox Hearth Products
- ☞ Hitzer Inc
- ☞ Fireplace Products US Supply
- ☞ Copperfield Chimney Supply
- ☞ Wilkening Fireplace Co.
- ☞ HearthStone
- ☞ Michigan Chim-Flex
- ☞ Thelin Company
- ☞ Osburn Manufacturing

NCHPA retailers submitted tracking forms for manufacturers and product that they (retailers) indicated were providing discounts. This number tallied 33 manufacturers. The list of manufacturers submitted by the NCHPA retailers follows in alphabetical order.

- Aladdin
- American Energy Systems
- Blaze King
- Breckwell Hearth Products
- Buck Stove Corporation
- Century Heating Products
- Country Flame Tech., Inc.
- Country Stoves
- Design Specialties
- Distinctive Hearth Products
- Even Temp/Mendota/Johnson Gas
- Energy King

- FPI-Regency
- Hargrove Mfg Co.
- Harman Stove Co.
- HearthStone
- Heatech, Inc.
- HTI / Heat-N-Glo
- Jotul North America, Inc.
- Kingsman Industries
- Kozy Heat
- Lennox Hearth Products
- MDR, Inc.
- Morso
- Napoleon Fireplaces
- Osburn Mfg.
- Pacific Energy
- Robert H Peterson Co.
- ICC Industrial Chimney
- Sherwood Industries, Ltd.
- Travis Industries, Inc.
- Vermont Castings / Majestic
- Wilkening Fireplace Co.

Consumer Callers, Web and Changeouts

Callers

A total of 2,295 consumers called the toll free line and requested information. There were 1,515 in February, 516 in March and 264 in April. Of these 1,640 (72%) were from NCHPA. Some people did not want consumer packets, but had questions that staff could address or refer to retailers in their local area. Some people had questions even though they wanted or had received the Consumer Packet. NCHPA staff mailed out 1,515 packets of information. Eleven of these were returned by the postal service during the Changeout program. Seven were resent after calling the individuals for corrected or additional address information. Four were not able to be re-contacted for correct address information. One packet, originally mailed on February 2, 2001, was returned (totally intact) to the NCHPA office on August 3, stamped undeliverable. No attempt to resend this packet was made.

Subjectively, calls also were received by the EPA and various state government offices. Referrals were then made to the respective affiliate, web page or toll free phone line.

Of the total requests for information from the toll free phone line for NCHPA, 68 were from the Upper Peninsula of Michigan, 9 from Iowa, 27 from North Dakota, 15 from South Dakota, 518 from Minnesota and 866 from Wisconsin. The rest of the callers were from the various states of Arizona, Florida, Colorado, Illinois and Texas. All of these callers were sent Consumer packets of Changeout information. State Departments from Michigan, Wisconsin and Minnesota also requested that material on burn barrels be included. The Wisconsin DNR also submitted information on mercury in the environment for inclusion as well.

Web

There were over 200,000 hits to the web page set up specifically for this Changeout program. The URL was www.woodstovechangeout.org. The web page provides the statistics

on changeouts per month, visits and other information. Additional hits were made to the HPA web site as well as the various government web sites.

Retailer Changeouts

A total of 1,287 Changeouts resulted from all the participating US affiliates (incomplete number according to J Crouch). The 79 retailers from NCHPA reported 1,083 changeouts (84% of total). One Minnesota retailer provided only a total number of 10 Changeouts and no tracking forms, while another Minnesota retailers provided the statistics from the tracking forms. The data presented is therefore from 1,073 NCHPA Changeouts.

Databases were analyzed to match those that called for information with those that actually purchased a product. Of the information provided, 2.3% of those that changed out had received information packets from NCHPA. Since 152 of the total number of 1,083 were numbers without consumer identifying information, no matching could occur. Of this 2.3% that were matched, 7 were from Minnesota while 31 were from Wisconsin. Of the 31 Wisconsin Changeouts, 23 purchased product from one of the Great Lakes Basin county retailers.

Based on tracking form receipts, Changeouts per store varied from none to 53. One Minnesota company with two locations combined their composite data and reported 142 changeouts between the two stores, but would not submit the Tracking Forms, indicating the information was confidential. NCHPA Changeouts per state are as follows:

➤ Iowa	=	3
➤ UP-Michigan	=	46
➤ South Dakota	=	4
➤ North Dakota	=	30
➤ Minnesota	=	356
➤ Wisconsin	=	634

Of the 634 Changeouts in Wisconsin, 432 were from retailers whose store was located in one of the Great Lakes Basin counties.

The breakdown of the 1,073 NCHPA changeouts as far as surrendered product was 649 stoves and 85 inserts. Additionally, 339 open hearths were converted with installations of inserts, gas logs or free standing units to stand in the opening or use instead of the open hearth. New appliances purchased based on the 1,073 is as follows:

STOVES

➤ new wood	=	438
➤ new pellet	=	20
➤ new gas	=	135

INSERTS

➤ new wood	=	141
➤ new pellet	=	5
➤ new gas	=	135
➤ new gas logs	=	13

The data were also reviewed in terms of the appliance changed out and what was purchased. The 649 old stoves turned in were replaced with the following:

STOVES

➤ new wood	=	480
➤ new pellet	=	18
➤ new gas	=	135

INSERTS

➤ new wood	=	8
➤ new pellet	=	5
➤ new gas logs	=	2

There were 85 inserts torn out. These were replaced with:

STOVES

➤ new wood	=	3
➤ new pellet	=	2

INSERTS

➤ new wood	=	43
➤ new pellet	=	1
➤ new gas	=	31
➤ new gas logs	=	5

Open hearth conversions numbered 339. Product purchased was:

STOVES

➤ new wood	=	5
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INSERTS

➤ new wood	=	90
➤ new pellet	=	3
➤ new gas	=	235
➤ new gas logs	=	6

The Wisconsin Department of Natural Resources required specific data from the 36 counties involved in their rebate program. The analysis of the Changeouts in the Great Lakes Basin counties is being provided for comparison reasons. This data yield the following: 383 old stoves were surrendered. These were changed to:

STOVES

☒ new wood	=	309
☒ new pellet	=	10
☒ new gas	=	54

INSERTS

☒ new wood	=	4
☒ new pellet	=	1
☒ new gas	=	3
☒ new gas logs	=	2

There were 49 old inserts surrendered in the Great Lakes Basin counties. These were replaced with:

STOVES

<input checked="" type="checkbox"/> new wood	=	2
<input checked="" type="checkbox"/> new pellet	=	1

INSERTS

<input checked="" type="checkbox"/> new wood	=	28
<input checked="" type="checkbox"/> new pellet	=	1
<input checked="" type="checkbox"/> new gas	=	12
<input checked="" type="checkbox"/> new gas logs	=	2

In addition, 40 open hearths were converted from retailers in the Great Lakes Basin counties. Thirty one installed wood inserts while the other 9 chose gas inserts.

Including the open hearth conversions, 82% of the changeouts that occurred from retailers in the Great Lakes Basin counties were to wood or pellet appliances. Only 18% of the changeouts were to gas appliances. This compares to the total percentages as follows: 61% of the 1,073 changeouts were to wood or pellet and 39% of the total went to gas. Exclusion of the open hearth conversions in the Great Lakes Basin counties yields the exact same percentage as with them included, namely 82% to wood and 18% to gas.

Additional analysis of the data denotes that 18 of the 79 NCHPA retailers did not report any Changeouts at all. Two of these were located in the Wisconsin Great Lakes Basin counties. This means that the 1,083 Changeouts occurred from 61 stores, thus the average was 17.75 per store that reported any activity. The average from the active Wisconsin Great Lakes Basin county stores was 13.9. When all 79 retailers are included in the data (including the 18 reporting no Changeouts), the average Changeout per store is 13.7.

Changeout Purchases by Month

Purchase dates of the appliances were reviewed for the 1,073 changeouts. There were 178 purchases during the month of February; 311 in March and 584 in April. Thus, there were more appliances purchased during the last month of the program than in the first two months combined.

Manufacturer Tallies

The tallies of changeouts from the 32 manufacturers listed by NCHPA retailers total 1,074. One consumer brought back their product during the program and was removed from the database but the form had already been sent to the manufacturer. Several other individuals also returned their stoves after the program. These tracking forms were pulled if not already sent. Several of these individuals had purchased product from retailers in the Wisconsin Great Lakes Basin counties. Since these individuals did, indeed, surrender a stove or insert that was taken to salvage yards, the Department of Natural Resources determined to still give these the \$200 since *their* objective was to get rid of the old stoves.

The 32 manufacturers provided from 1 – 280 appliances during this 3-month program. The top five companies provided 76% of all Changeouts as reported by the NCHPA retailers. Two of the manufacturers listed in the NCHPA tally of 32 actually returned the tracking forms

to the Affiliate office, indicating they were not participating in the program this year.

Consumer Wood Use and Reason for Changeout

Questions on the tracking forms tried to solicit information about consumers wood heating use and why they were buying a new product. Not everyone completed this area of the form. Data obtained are qualified by the number answering the respective question.

The response to number of years the consumer has heated with wood ranged from 1 year to 50 years. Of the 561 consumers that responded to this question, the average number of years they heated with wood was 14.2.

The average amount of wood (full cords) used per year by the 550 respondents was 4 full cords. The range was from ½ cord to 25 cords annually.

The last question asked consumers to rate the reason they were changing product at this time. The rating scale was from 1-6 with 1 being most important to 6 being least important. 496 – 554 responses were received on these ratings. The most important reason to make a change at this time was for efficiency with environment concerns being their least concern, however, just over the middle level rating of concern. Table 1 cites the average response.

Reason to Change Out	1 = primary reason – 6 = least concern Number represents average of responses
Old stove was worn out	2.85
Efficiency	2.04
Emissions. Want to cut down on air pollution	3.27
Environment concerns.	3.61
Aesthetics. Want a new look on my hearth	3.43
Convenience. Want something easier to use.	3.48

Table 1. Consumer rating chart.

Discussion

NCHPA had a tremendous response to this Changeout for 2001. It far exceeded expectations for planned Consumer Packets, calls, Retailer Kits and total Changeouts. Some of the issues of the program are discussed below. Many changes will need to be considered and then implemented if NCHPA is to sponsor another such program.

Promotion Communications

NCHPA provided articles in newsletters throughout the end of 1999 and in 2000 to talk about the pilot program and then the upcoming “big one” for 2001. A special mailing was sent to all retailer members and a list of over 100 non members in late fall of 2000, soliciting participation. The fall and winter newsletter also highlighted the program. There were also two additional mailings (including an astrobright yellow post card) which touted the program sign up. Board members encouraged personal signup. Feedback indicated only half of the retailers had read about the Changeout from NCHPA mailings. Consumer calls from media stories brought most of them to the attention of the program. An “early bird” promotion was offered for those that signed up early – yet only one retailer from NCHPA participated in this.

HPA was responsible for manufacturer communications. HPA sent faxes and e-mails to encourage manufacturers to get involved. Manufacturers were required to sign up and sign an agreement. As they did, their names were posted on the Changeout web page section for their involvement. As with the retailers, many manufacturers indicated they did not receive these notices. Some did not get routed to the right person in the company until well into the program.

Feedback also indicates that there was confusion between manufacturers, their reps and respective distributors and retailers as to what their financial involvement would be. Affiliate staff did not have all information on who the distributors and reps were that were involved in the program and therefore, did not have advance or continuing direct communications with them as they wanted.

Program Communications

Ground mail and faxes were to be the basic mode of program communications. It was determined this would be the most cost-effective method of communication. This, however, was totally dependent on the recipients reading the material and sharing it. The Frause Group maintained the Broadcast Fax network of all interested parties. There were advance program faxes and 4 during the program. The contact list on this network was not alphabetized so it was difficult to quickly find who was or was not getting this information. NCHPA staff utilized the ground mail system to provide additional program information, especially to update retailers on NCHPA statistics, call attention to program needs, and special government incentives and government rules. Eight retailers did not provide or did not have a fax number so they could not be contacted by this route, necessitating a special mailing of the fax each time.

Additional information was provided to NCHPA retailers through the Retail Kits as well as additional memos during the program for specific information on government programs or updates on what was happening. A one-page faxable Changeout Form was developed and mailed to all retailers that boldly noted that open hearth conversions was not included in the Wisconsin DNR rebate program as this became a major source of confusion during the early part of the program.

Although lots of information was provided, there was no assurance that all retail staff was getting all of it or it may not have been provided in the most concise manner to facilitate transfer of key program points. A simplified staff training points guide may need to be produced for any future programs.

Numerous phone calls, however, were received by the NCHPA office from retailers that needed to clarify various program points. Some retailers called multiple times, re-asking the same questions while others never called once and followed through with all program requirements. Several retailers indicated they didn't open their mail until April. The results of the retailer evaluation echo the problem with communications. See Appendix A.

Many retailers did not seem to understand that media coverage was stimulated by the PR firm and it was up to the media, not the PR firm or NCHPA, to cover the story or not. NCHPA, HPA or even the PR firm cannot force any TV station, radio or print to cover the Changeout story. HPA or the EPA grant had NO funds for placing ads on this effort. A media kit was sent out to encourage retailers to place ads once the program started but many expressed this was needed earlier. A decision was made to NOT send these or the Retail Kits out earlier. Experience with past Changeout programs noted that doing so results in ads and/or promotion occurring in advance of the start of the Changout program itself, despite being told not to, and then no "free" coverage will occur with a "Media Event" since the media would see

this as a marketing program. A big push from the “free” press is critical at the onset of the program so that it will continue during the program.

Wisconsin had two government incentive programs that were offered in only specific counties. This caused confusion on many fronts. The Wisconsin Focus on Energy program through the Department of Administration existed before the Changeout program and was only for purchase of “renewable” energy products. The loan program was through the State of Wisconsin. Some people thought that NCHPA or HPA was funding this program. Numerous calls had to be handled to correct concepts or to refer to the State for further information.

The Wisconsin DNR did offer a rebate program for changeouts of old stoves or inserts. They would *not* provide any money for conversion of an open hearth. The grant was received by NCHPA on February 6, 2001. Edits needed to be made with the final grant arriving on February 11. A memo was then developed and sent to all retailers, indicating the grant stipulations. Retailers questioned why NCHPA waited so long to tell them about the grant and others called with bitterness that they were excluded from being a part of the grant. Other retailers offered DNR rebates before receiving the information on the stipulations, then called to complain that they offered money for open hearth conversions and wanted NCHPA to take care of it.

NCHPA waited to get the grant in writing before making any assurance of money that may not exist. The stipulations in the grant were what the Wisconsin DNR determined. The monies were from a Great Lakes Fund. Benefits had to be for Great Lakes Basin counties. They indicated that they were working with a trade association, not consumer association, therefore the money would go to the consumers that did business with a retailer located in a Great Lakes Basin county. NCHPA nor HPA made these stipulations. Retailers outside these counties claimed loss of sales because consumers crossed county lines to get the rebate. Multiple calls were made by staff and to staff with questions about this grant.

Some Retailers needed to be reminded they signed an MOU agreeing to program terms. Calls were received about consumers going to dumps to get a discarded stove to turn in just for the money. Retailers needed to make sure the old stoves went to a salvage yard, not to a dump or not to be sold by consumers to someone else. This behavior would be a violation of the terms of the MOU and the grant. As the program progressed, staff found out some retailers were giving the Tracking Forms to consumers to take with old appliance to salvage yards. This was not the salvage assurance as signed for in the MOU. Some retailers charged consumers for old stove removal, some did not. The program was designed for this to be included as part of the program, but the wording was not absolute in the MOU.

The MOU also did not clearly indicate that this program was a sign up on a store by store location, not one company with as many locations as possible. The second memo from NCHPA tried to clarify this issue, but some continued to sell from two locations until staff noted they must pay for both to get double listings, materials, etc. The MOU failed to clearly state that the contact information requested on the form was going to be posted on the web page for consumer contacts. This resulted in posting changes on the web and the retailer listing sheets for consumers. Some people signed the MOU and gave their administrative office, not store location. This will need to be changed and clarified in future forms.

The majority of articles written, radio spots and TV coverage did fairly well with the information provided. The majority of complaints received at the NCHPA office had to do from consumers regarding the Wisconsin DNR grant rebate. Staff had to reiterate program details, review news articles, call and/or write to people that were angry, bitter, hostile or just confused.

Some threatened legal actions. Some articles did not clarify DNR rebate restrictions on open hearths versus inserts and stoves. Some thought it was where they lived, not where the retailer store was. Some consumers seemed to be trying to beat the system and take advantage of retailers. Luckily, in consideration of the thousands of calls and Changeouts, there were only a few that were extremely unpleasant to deal with.

Tracking Forms

The four part carbonless tracking forms were based on a format used with past changeouts. A major problem with this is the legibility (or illegibility) of handwriting by whoever was filling out the forms. This is problematic for Affiliate staff as well as for manufacturers trying to provide credits. This was particularly problematic when correct spelling of names and addresses was needed for NCHPA to cut checks and mail to the DNR rebate recipients. This required checking web pages for address or spelling information, calling retailers to check invoices or trying to contact the consumer directly for information. The latter was avoided since many of these calls resulted in no answers and no answering machines to even leave a message. Staff would try later in the evenings and even weekends. Some retailers provided copies of invoices to go to the manufacturers which helped with this legibility problem.

The tracking form cited "date" at the top. Many retailers had to be recontacted as they put the date they filled out the form, not date of purchase. This was a problem when dates were May, June and July and the program ended April 30. The problem was for the Wisconsin DNR rebate as well as manufacturer credit. This needs to be revised to "date of purchase".

Many forms were turned in with missing information. An old appliance may not be recorded. This was critical with the DNR rebate. Manufacturer names would not be cited or new product. Unfortunately, there was no place to cite if insert or stove or open hearth changed out and what replaced. Many calls were placed to obtain this information. Salvage yard signatures may also not be obtained or only an initial (unacceptable to the Wisconsin DNR). Again, this necessitated follow-up by staff. No follow-up on incomplete information on heating by consumers was done. This was recorded as is.

Finances

In 2000, the Board of Directors budgeted \$30,000 for the 2001 program with \$15,000 being for PR and \$15,000 for staff support and materials. This was revised to a total of \$15,000 when EPA provided a grant to HPA which was going to support the PR effort for the Great Lakes States. An additional \$1,000 was authorized in January of 2001 by NCHPA to provide PR for the NCHPA states that did not border the Great Lakes. The total NCHPA budget of \$15,000 was for approximately 200 hours of labor, 500 Consumer Kits and 400 Changeouts from 50 retailers.

With over 1600 consumer calls, 1500 Consumer Kits, and 79 retailers, the time to handle all these needs multiplied tremendously. When the DNR grant came to fruition, this was an additional need with its own set of additional laborious additives (e.g. copies of all tracking forms x 2; sets of consumer lists, invoicing to the DNR and processing of checks to over 400 consumers, and finally a report to the DNR due by 8/31/01). At the time of this writing, the program costs from 10/1/00 – 9/15/01 total \$ 33,200.78 of which \$986.56 was PR for the non Great Lakes states, \$8,135.44 is materials and supplies with over \$3,500 being postage alone. The rest was labor with over 600 hours involved. This expense to date is a minimum amount since money from the DNR for the last 3 invoices has not been received so over 90 checks have yet to be processed.

Summary

This was the largest program ever undertaken by NCHPA. It had tremendous benefit for many while no benefit for others. It had an extremely positive PR value for the industry. It created liaison relationships with government entities where none existed before. It opened channels of communication with many members when this didn't exist before. It brought in new members. It had many positive outcomes. The negatives can be reversed with pre-planning for any future program.